DOCUMENT RESUME

ED 280 185 EA 019 307

AUTHOR Larson, Elizabeth J. Hunt
TITLE M.A.P.S.: Mesa Action Planning System.
INSTITUTION Mesa Public Schools, Ariz. Dept. of Research and Evaluation.
PUB DATE Jan 86
NOTE 80p.
PUB TYPE Reports - Descriptive (141)

EDRS PRICE MF01/PC04 Plus Postage.
DESCRIPTORS *Board of Education Policy; Board of Education Role; Community Involvement; *Cooperative Planning; Cooperative Programs; Educational Assessment; Educational Cooperation; *Educational Planning; Elementary Secondary Education; Enrollment Projections; *Long Range Planning; Mission Statements; Participative Decision Making; *Policy Formation; Program Evaluation; Program Implementation; *School Community Relationship; School District Autonomy; School District Size
IDENTIFIERS *Arizona (Mesa); Policy Implementation

ABSTRACT

This report describes implementation of a districtwide planning model in the Mesa, Arizona, Public Schools. Figures illustrate planning processes throughout the report. Intended as an implementive framework, the planning system's purposes are to assist decision making about resource allocation, program direction, progress measurement, and district ability to meet future challenges. The report outlines past planning activities, which were begun in 1968 to accommodate dramatic enrollment increases. An overview reports the phases of the planning model, which is designed to determine long- and short-range plans and which is a cyclical process relying upon participant collaboration. Key participants include community representatives, district personnel and administration and board members. Planning groups include the governing board, the superintendency, and the community-based planning, internal planning, and budget committees. During phase 1, broad goal statements are developed and reviewed by the superintendency, planning committees, and governing board prior to adoption. The community-based planning committee, during phases 2 and 3, evaluates the district's future and reviews community demographic trends, enrollment projections, and economy. The planning document produced by this group details challenges and opportunities for the future; it is also used for mission statement revision and strategy definition (phase 4). Departments, divisions, and schools develop long-range plans from documents developed at the district level, and the internal planning committee aggregates the plans, which form the long-range plan after board approval. Short-range plans are also created for the next school year. Phase 5 outlines activities during implementation. An appendix includes mission statements. (CJH)

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

X This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

James DeGracie

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

ED280185

M.A.P.S.

Mesa Action Planning System

Elizabeth J. Hunt Larson

# DEPARTMENT OF RESEARCH & EVALUATION

EA 019 307

MESA PUBLIC SCHOOLS

BEST COPY AVAILABLE

# M.A.P.S.

## Mesa Action Planning System

Elizabeth J. Hunt Larson

Dr. James K. Zaharis
SUPERINTENDENT

Dr. James S. DeGracie
DIRECTOR
RESEARCH AND EVALUATION

January 1986
MESA PUBLIC SCHOOLS

TABLE OF CONTENTS


| | | Page |
|---|---|---|
| I. | Prologue | |
| | Past Planning Activities . . . . . | 1 |
| II. | Planning System Overview . . . . . | 5 |
| III. | Organizational Roles in the Planning Process | |
| | Participants . . . . . | 13 |
| | Methods of Participation . . . . . | 19 |
| IV. | Key Questions and Planning Activities | |
| | Phase I: Mission and Goals Statement . . . . . | 25 |
| | Phase II: Environmental Assessment . . . . . | 32 |
| | Phase III: Scenario Selection . . . . . | 40 |
| | Phase IV: Strategy Definition . . . . . | 45 |
| | Phase V: Implementation and Review . . . . . | 55 |
| Appendix I . . . . . | | 58 |

# FOREWORD

The development of a planning model for use in districtwide planning was initiated at the request of the Superintendency and Governing Board of the Mesa Public School District. Due to the dynamic characteristics of the community, planning to meet the needs of the future was identified as a critical concern of the district.

The planning model developed by the Department of Research and Evaluation was based upon the premise that community participation is a key element in planning. Compatibility with existing planning methods was also a primary concern. The current model is meant to provide a framework for implementation and as such is subject to further refinement. It will be supplemented by technical reports and procedural manuals.

The major effort in the development of this report was the responsibility of Research and Evaluation under the direction of Dr. James DeGracie. Ms. Donna Replogle and Mrs. Gloria Dennis accomplished the extensive typing, editing and creation of graphics for this report.

Research and Evaluation is a department answering to the Associate Superintendent, Mr. David Eagleburger.

# EXECUTIVE SUMMARY

## Purpose

The purpose for developing a planning system is to assist in decision making regarding the allocation of resources; to direct program and operating decisions; to provide a yardstick by which to measure progress; to ensure that the district will be prepared to meet the challenges and opportunities of the future. Mesa schools have historically used planning to help meet the demands of the future. Mesa Action Planning System (MAPS) has been developed to provide a comprehensive systematic method for planning.

## System Summary

The Mesa Action Planning System proposes coordination of planning activities between all organizational levels in the school district. Participants and activities are suggested for each step in the process. Key participants include community representatives, district personnel, administration and Board members. Planning groups include the community-based planning committee, the internal planning committee and the budget committee.

Five planning phases have been defined. During Phase I, a broad statement of district purpose and goals is developed. This mission statement is reviewed by the Superintendency, the internal planning committee and the community-based planning committee and the Governing Board prior to final adoption by the Board. It addresses every area critical to the success of the district in very broad terms.

The community-based planning committee evaluates and selects the most likely possible future for the district. Information which is reviewed includes external trends in the family, legal environment, the economy and technology. In a separate session internal trends are considered including enrollment projections, community demographics and financial projections. Phase II, "Environmental Assessment," and Phase III, "Scenario Selection," are conducted by this group. The planning document produced by this group describes the challenges and opportunities of the future. It is used to revise the mission statement (Phase I) and as a basis for strategy definition (Phase IV).

Concurrently, an internal planning group is formed. Responsibilities of this group include coordination and monitoring of the planning effort and review of the mission and goals statement.

During Phase IV, "Strategy Definition," each department, division and school uses the planning documents developed at the district level to develop long-range plans. Plans are reviewed by the internal planning committee for consistency with the goals of the district. The plans are then aggregated and after Board approval form the long-range district plan. Short-range plans are also created to direct activities in the following school year.

Phase V describes activities during implementation.

# I. PROLOGUE

# PAST PLANNING ACTIVITIES

During the ten years from 1975 to 1984 the Mesa Public Schools has grown from 28,951 students to 46,970. This is a growth of 18,379 or 164 percent. During this time the Mesa Public Schools has kept ahead of their student enrollments through judicious planning. Even though the schools increased by more than 18,000 students, very few disruptions were observed in the schools. That is, only on rare occasions were there double sessions or other environments which would detract from the learning of the young people of the Mesa Public Schools. Some examples of past planning activities follow:

## Formation of District Advisory Committee - 1968

A district advisory committee was formed in 1968 which was comprised of school personnel, parents, students and members of the business community. The total committee in turn was divided into smaller committees. The purposes of these advisory committees were: (1) To learn about the present operational procedures, programs, scope, problems and needs of the various departments and divisions of the Mesa Schools. (2) To provide opportunity for lay citizens, teachers and administrators to work together in examining the operations of the schools. (3) To provide the opportunity to make constructive suggestions for improvement to the Superintendent and through him to the Governing Board.

District Needs Assessment - 1972

A district needs assessment was conducted as a follow-up to the recommendations made by the citizens' advisory committee. The district needs assessment tapped into selected populations including the Superintendent's cabinet, school principals and assistant principals, district directors and coordinators, teachers, Governing Board members, influential community members, members of minority advisory groups and secondary students. As the result of this needs assessment, specific goals were identified for the Mesa Public Schools.

Mesa Previsited (1980) - 1975

A document was produced in 1975 that made a projection of the environment that the Mesa Public Schools would be faced with in 1980. Based on this environment or scenario, given strategies were developed to meet the specific needs dictated by the scenario. Based on the predictions in Mesa Previsited, a number of program changes were made in the method of delivery of educational and administrative services within the Mesa Public Schools.

District Needs Assessment - 1977

In 1976, a follow-up of the 1972 needs assessment was conducted. Again, a large sample of community representatives were included in the sample. Based on this input from the participants, specific goals were identified for the Mesa Public Schools.

Projections

During this total period of time, student population projections were continually made. Based on these projections, school sites were selected, buildings were constructed and in general the physical plant needs of the district were met.

## Curriculum

To meet the needs the specific goals identified in the different needs assessments conducted within the Mesa Public Schools, given curriculum programs were designed. These programs included the Continuous Uniform Evaluation System, curriculum charts for each of the grade levels, graduation skills requirements program, and an overall student assessment program. Just as the curriculum was mapped specifically to the identified goals and objectives identified through the need assessments, the evaluation and monitoring systems were designed to ensure that the goals and objectives specified were met through the developed curriculum programs.

## Land Use Studies

As Mesa has continued to grow through the last 20 years, and particularly through the last 10 years, one area has not been specifically addressed through the different planning models. The area is land use or at what point in time will the Mesa Public Schools area be saturated and a decline ensue. In 1983, studies were begun to determine when this saturation point will be reached and at what time a decline could be anticipated. The Mesa Public Schools is currently conducting a number of land use studies. The studies are designed to determine the availability of land for single family and multifamily dwellings and to project the number of students that could be anticipated from these dwellings. These results will then be used to determine at what point all of the available land encompassed by the school district would be developed and at what time could a decline be expected.

# II. PLANNING SYSTEM OVERVIEW

# PLANNING SYSTEM OVERVIEW

The Mesa Public Schools has continually instituted different planning activities to meet specific needs. These activities, however, have not been systematic in nature and although they have met the specific needs identified, it is strongly felt that there is a need for an overall systematic method of planning. This plan should encompass all such activities conducted in the past, but should also ensure that the overall strategic planning of the Mesa Public Schools is such that any contingency which may arise has been anticipated to the extent possible. Based on this need, the Mesa Action Planning System has been developed and is presented in this document. MAPS as outlined in the following sections of this report is a system which incorporates strategic planning methods. MAPS describes the planning activities at the district level as well as at the schools and operational units such as transportation, grounds and so on.

The order of this document is to first give the overall MAPS planning overview. Organizational roles in the planning process are then discussed. This is followed by the specific key questions to be asked and an outline of planning activities.

The Mesa Action Planning System is a strategic planning model designed to determine long-range and short-range plans for the Mesa Unified School District. The planning process provides a framework for both department and school-based planning. The plans developed at each level will relate directly to the district mission and goals. The planning model describes a process that is cyclical and relies upon collaboration between many participants.

MAPS is a five cycle system in which district budgeting and planning is preceded by environmental analysis and determination of critical factors. The five steps or phases as described in Figure 1 are:

| | |
|---|---|
| Phase I: | District Mission and Goals are Set |
| Phase II: | External and Internal Environments are Evaluated and Critical Factors Determined |
| Phase III: | Most Likely Scenarios are Selected |
| Phase IV: | Strategies are Defined for Accomplishment of Goals for Each Selected Scenario |
| Phase V: | Implementation and Review Leads to a New Planning Cycle |

Phase I: Mission and Goals Statement

During Phase I a district mission and goals statement is developed. The mission statement answers the question, "What is our main purpose?" The statement is general enough to provide widespread support while distinguishing the unique orientation of the Mesa Public School District. Development of a mission and goals statement assumes a time horizon of many years.

The goals statements which follow clearly define district intent in all of those areas that are necessary for the survival of the school district. District goals can address: human resources, community relationships, the ability to adapt and school finance.

The mission and goals statement will be used as a guideline in all departments and individual schools as the basis for developing unit plans. A well constructed mission and goals statement encourages unity and coordinates the planning effort.

The Governing Board and the Superintendency share responsibility for the creation of the mission statement. The community-based planning committee and internal committee provide input regarding the mission and goals statement prior to final adoption by the Board.

Phase II: Environmental Assessment

An environmental assessment is conducted by a community-based committee and critical factors are identified. All opportunities and problems which may impact the realization of the district mission and goals are outlined.

Considered in the environmental assessment are external factors such as the legislative events, public opinion, the economy, the courts, educational technology, labor pool supply and demand and family structure. External forces are largely outside of the influence of the district but affect the ability of the district to meet its goals.

Concurrently, internal factors which may impact the ability of the district to achieve its mission are defined. Enrollment projections, a demographic profile of the school community and financial projections are prepared and evaluated in light of external trends.

Phase III: Scenario Selection

As a result of the investigation of critical factors (those problems or opportunities which could impact the district mission) several scenarios are proposed. Each scenario is weighed according to probable occurrence. The most likely scenario is chosen as a basis for long-range planning. Other probable scenarios are considered and are developed to a lesser extent. Alternate scenarios are the basis for contingency planning. They may be called upon later in the planning cycle.

Phase IV: Strategy Definition

Plans are formulated at the district, departmental and school level to achieve "success" as defined loosely by the mission and goals statement under the most likely condition described in Phase III.

First a long-range district plan is outlined in response to the most likely scenario. In order to determine optional solutions a cost-benefit analysis is conducted on several possible plans.

A cost-benefit analysis evaluates the effectiveness of various solutions by weighing the positive and negative impacts of a decision. The final plan is based upon an evaluation of resources and opportunities. Next, the district goals, environmental assumptions and long-range plan are operationalized at the departmental and school level. At both levels long-range planning is conducted. The plans are reviewed at the next higher departmental level. The departmental plans are then accumulated and reviewed at the Superintendency prior to presentation to the Board.

The final product, a long-range districtwide plan, is the result of a creative review and revise cycle at each level. Long-range plans are further refined into specific operational targets for the current year. The district mission and most likely future scenario, guide the development of short-range plans. Short-range plans chart activities for the year. They evolve directly from the long-range plan. Action plans state the objective desired. A benchmark is set by outlining current status. Specific activities are then defined. In order to implement the plan responsibilities are charted, resources allocated and a timeline is set. Finally, specific measurable criteria for success are defined.

Short-term planning at each level is finalized through the review and revise cycle at the next higher level. Short-range district plans like long-range plans are accumulated and reviewed at the administrative level prior to inclusion in the district plan.

Phase V: Implementation and Review

The planning process is not a static activity. Planning and reality are tied together by systematic monitoring. As plans are formulated, they are reviewed at the next higher level and incorporated into the total plan. Further, a mechanism will be developed to monitor the system to accommodate changes. The district plan should be responsive to several possibilities and may return to alternate solutions determined for differing scenarios. Yearly plans are evaluated for appropriateness and results are incorporated into the operational planning for following years.

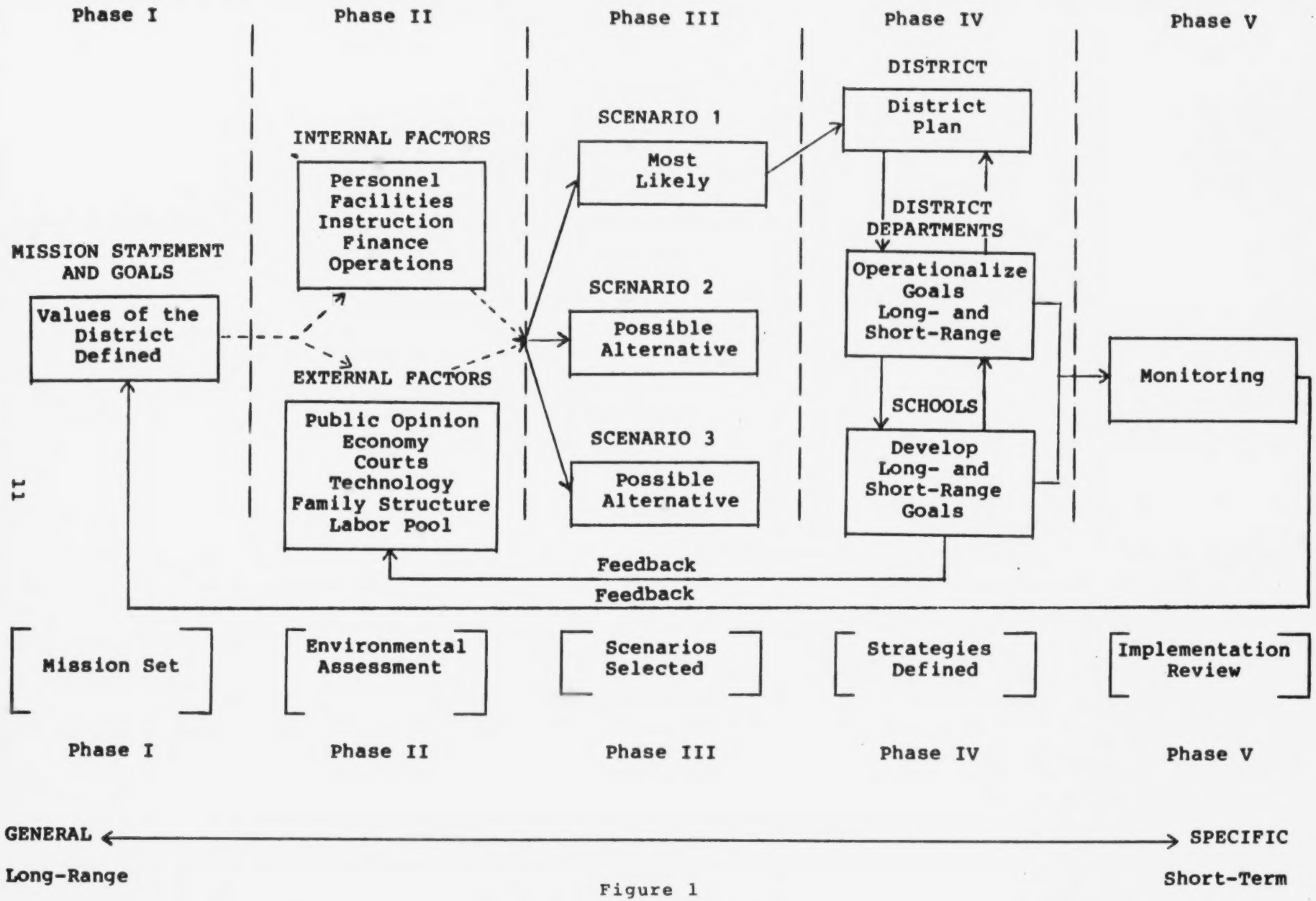
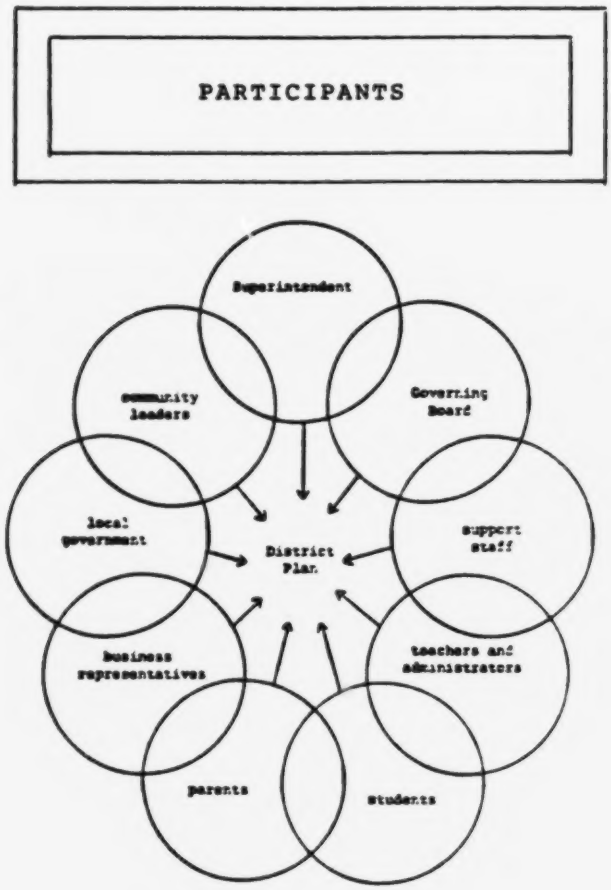

Phase I
Phase II
Phase III
Phase IV
Phase V
MISSION STATEMENT AND GOALS
Values of the District Defined
INTERNAL FACTORS
Personnel
Facilities
Instruction
Finance
Operations
EXTERNAL FACTORS
Public Opinion
Economy
Courts
Technology
Family Structure
Labor Pool
SCENARIO 1
Most Likely
SCENARIO 2
Possible Alternative
SCENARIO 3
Possible Alternative
DISTRICT
District Plan
DISTRICT DEPARTMENTS
Operationalize Goals Long- and Short-Range
SCHOOLS
Develop Long- and Short-Range Goals
Monitoring
Feedback
Feedback
Mission Set
Environmental Assessment
Scenarios Selected
Strategies Defined
Implementation Review
Phase I
Phase II
Phase III
Phase IV
Phase V
GENERAL
SPECIFIC
Long-Range
Short-Term

Figure 1

# III. ORGANIZATIONAL ROLES IN THE PLANNING PROCESS




The basic premise of goal setting is that the more people who contribute to the goal-setting process, the better. Key participants should include those who will be called upon to implement plans. A significant range of backgrounds and perspectives can enrich the planning process. Participants should include: staff at all levels, high school students, Board members, representatives of local government, business and industry, labor, and the community in general. While the level of involvement described may at first seem unworkable due to the diversity and number of people involved and the types of decisions to be made, a carefully planned system can incorporate the participative approach.

Since activities are repetitive, in that review and modification occur at several levels, opportunities for participation are frequent.

A major consideration in the development of the planning system is the definition of who should be included and what methods of participation are appropriate.

Significant planning participants in MAPS include: the Governing Board, the Superintendency, the community-based planning committee, designated staff, an internal planning committee, a budget committee and school and department subcommittees.

The Governing Board and Superintendency

The Governing Board and Superintendency share responsibility for selection of planning participants and approval of the district planning model. A commitment to planning at this level is paramount to success. Final authority for acceptance of the district plan resides with the Board. All procedures and products should be consistent with the mission and goals statement developed by these two groups in Phase I. Opportunities for review and feedback are designed into the planning model and all subcommittee school and departmental plans are subject to Board approval. Program prioritization is a key function of the Board and Superintendency as an initial step in Phase IV, "Strategy Definition."

The Community-based Planning Committee

The community-based planning committee is established at the beginning of Phase II. Their primary task is to conduct the environmental assessment and select the most likely scenario which will describe the future conditions in Mesa. Review of the mission

and goals statement is also within the responsibility of the community-based planning committee. They produce a document which is a key planning tool in Phase V (Strategic Definition). It defines the environmental assumptions which must guide the planning effort and outlines the areas of critical need which must be addressed.

The selection of the community-based planning committee members is conducted by the Board and Superintendency and should include representatives from each of the following groups:

Parent Teacher Organizations

Clergy

Mesa Association of School Administrators

Teachers including representatives of the Mesa Education Association

Mesa School Classified Personnel Association

Civic Organizations, i.e., Rotary, Soroptomists, Lions

Industry Representatives

Students

Governmental Representatives

Chamber of Commerce

Geographic Representation

Other community representation

(The selection process is further described in Phase II.)

Designated Staff

Staff must be designated to gather data needed for environmental analysis and coordinate planning activities. Trends in enrollment and projections must be prepared and financial trends analyzed for use in the internal assessment conducted in Phases II, III and IV.

Forms for issue prioritization must be prepared and survey instruments designed to collect information from the constituencies not directly involved in committee work. Results from surveys must be analyzed.

Staff involvement is heaviest in Phase II. Coordination of the planning effort and monitoring duties must be assigned to specific staff.

The Internal Planning Committee

The internal planning committee is responsible for development of a district response to the areas of critical need defined by the community-based planning committee in Phase II. The internal planning committee is comprised of the following members:

one elementary principal
one junior high school principal
one high school principal
Administrative Assistant for Energy Conservation
the Associate Superintendent, Educational Services (chairman)
the Assistant Superintendent, Business Services
the Assistant Superintendent, Curriculum and Instruction
the Assistant Superintendent, Pupil Personnel
the Assistant Superintendent, Elementary Education
the Assistant Superintendent, Secondary Education
the Assistant Superintendent, Personnel

Program prioritization is conducted by the Superintendency, the Board and the internal planning committee to help guide the resource allocation decisions of the budget committee and the planning efforts of each department. The internal planning committee

coordinates the planning effort conducted in each department at the district level. The internal planning committee provides information, monitors and reviews the planning process at the departmental level.

The Budget Committee

The budget committee has primary responsibility for preparation of the yearly budget. They also explore alternative solutions to resource allocation problems for specific one-time events not covered by departmental and school planning efforts. If necessary, a task force may be assigned to help with special issues. The budget committee must meet the deadlines established by state law regarding budget preparation and publication.

In November budget request forms are sent to all administrators. The requests are returned to Financial Services in January. Study sessions are initiated in February and continue until May 24 when the proposed budget is advertised. As of June 1, the proposed budget is sent to the county school office. Following an official public hearing on June 10, 1986, the adopted budget is sent to the county school office on July 18.

This budget committee is small and due to time constraints and the necessary expertise is headed by the Director of Financial Services and overseen by the Assistant Superintendent of Business Services.

Budget committee members may include:

the Director, Financial Services

the Assistant Superintendent, Business Services

the Assistant Superintendent, Curriculum and Instruction

the Assistant Superintendent, Elementary Schools

the Assistant Superintendent, Secondary Schools

the Assistant Superintendent, Pupil Personnel

the Assistant Superintendent, Personnel

Departmental and School Subcommittees

Departmental subcommittees are established in each area: Business Services, Pupil Personnel, Curriculum, Elementary Schools, Secondary Schools, Office of Information and Development, Office of Public Relations and Personnel to develop plans. Membership should be comprised of representatives of subunits within the department. The planning parameters are provided to each area through the following documents: The district mission and goals statement, the environmental assessment and the district program prioritization.

Long-range and short-term planning is conducted, implemented and monitored by departmental and school subcommittees.

## METHODS OF PARTICIPATION

Prior to initiating any formal planning activities a communications network must be defined. A variety of methods for gathering and disseminating information throughout the planning process will ensure continued support for the planning process and will help produce plans which most accurately reflect community opinion. Realization of plans can be achieved only through an appropriate communication plan for each step of the planning cycle.

The audiences which need to be included are citizens of the community who support school operations through their tax contributions, parents, industry and labor groups, students, community leaders, and school employees. Separate techniques are appropriate for each planning level and group.

### Methods for Gathering Information

1. Surveys: It is not practical or possible to include all of the interested individuals in the planning committee process. However, input from key participants can be solicited through the use of a survey instrument.

Benefits of the use of survey techniques include the ability to greatly enlarge the circle of participants. Further, planning decisions which consider the opinions of key constituencies are more likely to be supported and realized. A secondary benefit of surveys

is that they may generate enthusiasm for the planning effort. A survey is suggested in Phase II, "Environmental Assessment," in order to identify those issues which are critical to the success of the district. Responses are sought from many individuals both internally and outside the district.

Surveys of a smaller scope may be appropriate during strategy definition at the school and department level (Phase IV).

Costs to consider include: staff time, materials, mailing expense and computer time.

2. Review of past planning efforts: A wealth of information can be gleaned from planning efforts in other school districts across the country. Review of literature also provides examples of planning methods and products. Overreliance on information from other districts, however, can lead to planning which does not meet the unique needs of the district.

Used judiciously, information from other districts or from past district efforts can provide a springboard for discussion. The main advantage to the use of this method is efficiency.

In MAPS Phase I, the definition of the mission and goals statement, a review of past planning activities and planning in other districts is suggested.

The development of worksheets and defining formats for finished reports can be facilitated through a survey of planning models currently in use across the country.

Planning costs consist largely of staff research time.

3. Committee meetings and task forces: The use of small groups of key participants is a method used consistently throughout MAPS. Committees are effective only if membership is representative of the community and organizational procedures are well defined.

The benefits of committee work include the ability of the group to work over an extended time period to solve problems. Individuals are able to give full consideration to specific issues. If properly selected, committees can represent the larger community.

Committee work must be supported by an adequate plan to share information.

While most committee members volunteer their time, costs for staff time and external planning consultants or facilitators should be considered. Teachers may be compensated for assuming planning responsibilities on curriculum or other committees in addition to their other duties.

Methods for Sharing Information

The degree of public awareness and internal support for the district plan is directly related to the adequacy of the information sharing network.

Interest in the planning process can be maintained by informing participants of planning status. The development of specific planning documents should be formally announced to the press. Approved plans should be shared with the community. The most cost effective method used depends upon the group to be contacted. Public hearings, advertising in local media, mailings or handbills are possible methods for sharing information.

The committee members and those involved in the planning process should be included in the information network. Communication during their involvement as well as follow-up communication is critical. An informal planning memo or newsletter and staff mettings are alternative methods which can be used internally.

# IV. KEY QUESTIONS AND PLANNING ACTIVITIES

This section presents guidelines to assist in operationalizing the planning process. Specific questions which must be answered are listed and activities are presented in more detail.

The five phases of the planning model include:

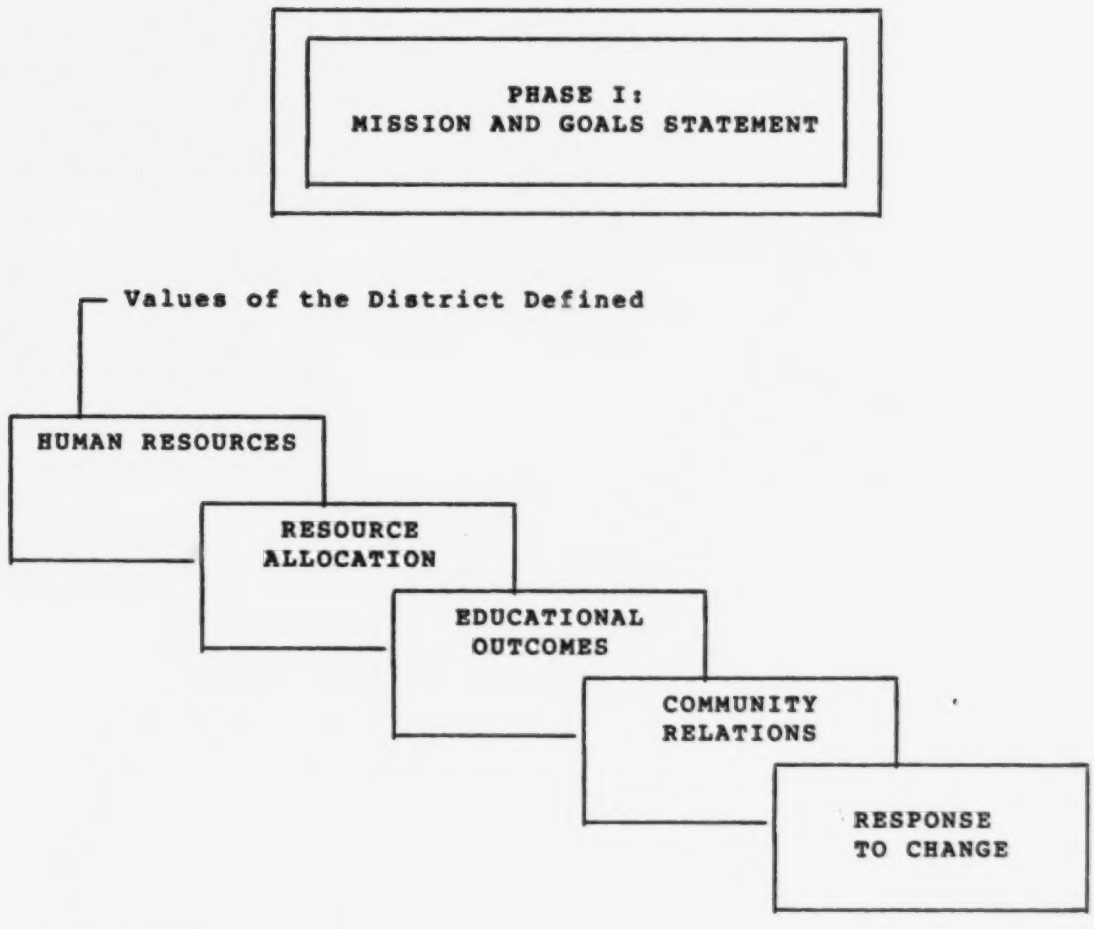
Phase I: Mission and Goals Statement

Phase II: Environmental Assessment

Phase III: Scenario Selection

Phase IV: Strategy Definition

Phase V: Implementation and Review




Key Questions

* What is success?
* Who do we want to be?
* What do we believe?

Planning Activities

1. The areas for belief statements are defined.
2. Previous Philosophy and Goals Statement is examined. (See Appendix I.)

3. New areas are considered for inclusion in the goals statement including:

   a. financial philosophy

   b. human resource philosophy

   c. educational outcomes

   d. community relationships

   e. philosophy of planning for change

Development of the mission and goals statement is accomplished in several stages. The statement is meant to be stable but is subject to review and should be refined in light of the environmental assessment which follows. This section describes the participants and stepwise process in developing the mission and goals statement. This procedural model should be revised as needed after actual planning begins.

The mission and goals statement is the responsibility of the Board. As a guideline, the statement should be a series of broad and comprehensive statements which will guide the specific goals set at the department and school levels. A statement of primary purpose is defined followed by a goal for each area critical to the success of the district.

For example, the main mission of the school district, or the answer to the question, "What is our mission?" could be a version of:

## MESA PUBLIC SCHOOLS MISSION STATEMENT

Mesa Public Schools primary mission is to offer:

* an educational experience which

  - will provide students with competency in basic skills including the ability to read with comprehension, demonstrate the ability to use mathematical skills and to communicate effectively in speech and writing.

  - will provide opportunities for learning in a wide range of content areas.

  - will help students to develop problem solving and reasoning skills and an ability and interest in learning.

  - will help students to relate to other human beings through the development of interpersonal skills.

  - will provide students with a perspective of the world, society and the responsibilities of citizenship.

  - will recognize the unique qualities of each student and encourage students to develop to the fullest of their capacity.

  - will prepare students to lead productive adult lives.

## MESA PUBLIC SCHOOLS GOALS OF EDUCATION

**1: The district must produce "well-educated" graduates.**

### A. BASIC SKILLS

The district will provide educational services to ensure that all students attending Mesa Schools meet minimum competency standards in these basic skills areas: Students will communicate effectively in speech and writing, read with understanding and demonstrate the ability to use mathematical skills. A positive attitude toward learning and the skills needed for lifelong learning will be fostered.

### B. GENERAL EDUCATION

The district will provide opportunities for all students to acquire knowledge in a broad range of academic areas including: the social sciences, the physical sciences, the arts, the humanities and mathematics. The physical well-being of students will be promoted through an active physical education and health program.

### C. VOCATIONAL EDUCATION

Students will have the opportunity to master vocational competencies.

### D. SPECIAL NEEDS STUDENTS

The district will meet the legislative mandate to provide a free and appropriate education for all children. Children with special needs will receive services which will allow them to develop to the fullest of their potential.

E. SUPPORT SERVICES

The district will provide counseling and guidance to assist students in their academic and personal development.

| 2: The district must be effective in terms of human organization. |
|---|

The human resources of the district are recognized as a primary factor in the successful accomplishment of our mission. A major objective of the district is to recruit and maintain an effective work force and to promote policies which will enhance the character of the working environment.

Good relationships will be developed between staff, students, administrators and the community.

The district will actively promote communication and cooperation between all of these participants.

3: The district must respond to larger societal concerns.

The needs of the community and the legal and legislative climate are recognized as crucial to the success of the district. The goals of the district include the development of a strong network of community support and involvement. The district will subscribe to all legislative mandates at the local, state and federal level. Educational programs will be developed which teach students the functions of government and the responsibilities of citizenship. Community education programs will serve the needs of the local community.

4: The district must adhere to a responsible fiscal policy.

The district must administer resources in order to produce the greatest return for the funds invested. Resource allocation decisions will reflect program priorities. The district will be accountable for the stewardship of resources.

5: The district must be able to change and adapt in a rapidly shifting environment.

A method for anticipating challenges and opportunities will be adopted. Planning for the future will receive a high priority on the administrative agenda.

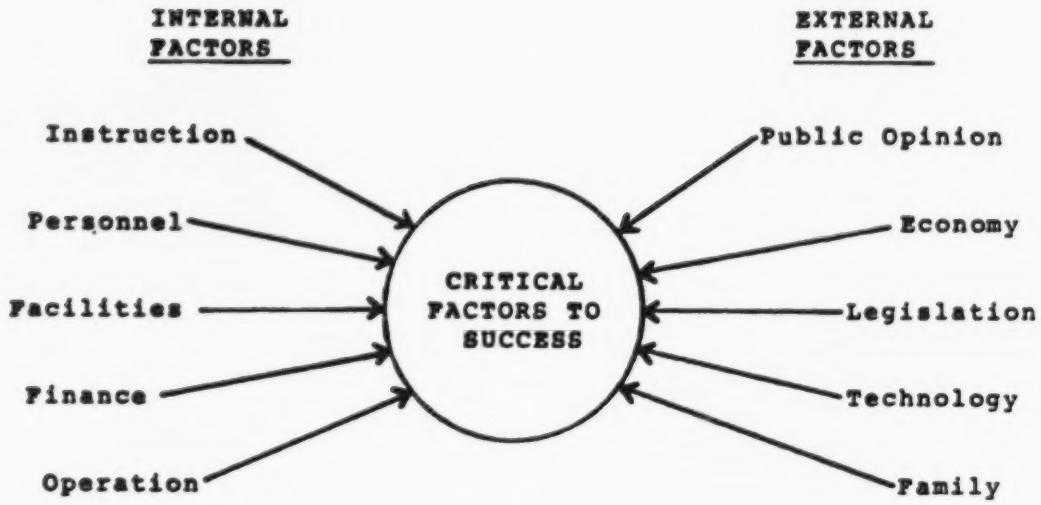
Functional Responsibilities

Phase I:

The mission and goals statement is prepared by staff, reviewed by the Superintendency and reviewed by other planning groups prior to approval by the Board. Changes are incorporated by staff and the statement is used as a guide for all planning groups. As the last step in Phase II, "Environmental Assessment," the mission and goals statement is reviewed by the community planning committee where the representatives of constituencies included in that committee have the opportunity to recommend any changes in the statement. At this point the Superintendency and Board evaluate the suggested changes and may refine the original statement.

**PHASE II:**
**ENVIRONMENTAL**
**ASSESSMENT CRITICAL FACTOR**
**SELECTION**

Critical Factor Selection




Key Questions

* What external factors could help us to succeed or cause failure in meeting our mission?
* Which critical factors are most likely to occur in the next five years?
* What national trends are most likely to impact Mesa?
* What are the important legislative, economic and demographic trends in the state of Arizona?
* What changes, if any, will occur in Mesa and neighboring communities?
* Who will the residents of Mesa be?
* What will be the educational needs of the community?
* What resource base will exist?

Planning Activities

1. Opportunities and threats are identified by external assessment:
    a. A preliminary brainstorming session identifies factors for consideration.
    b. All items with possible impact on achievement of the district mission are considered.
    c. Data is compiled into a report for review by the community-based planning committee.
    d. The internal planning committee reviews trend data.
2. An overview of internal status is prepared.
    a. Enrollment projections are prepared.
    b. Financial facts are summarized for review.
3. Community-based planning committee surveys constitutencies:
    a. Likelihood, timeliness and urgency of trends are set.
    b. Additional trends are identified.

Data collection is most extensive in the environmental assessment phase. At this point identification of all threats and opportunities is emphasized. A thorough environmental assessment draws upon many sources of information and involves all of the participants in the planning process. Further analysis and definition of responses is conducted in the next Phase, "Scenario Selection."

External and internal assessment can be conducted simultaneously. Each process will be discussed in terms of the participants and activities.

Environmental assessment identifies significant variables in the environment which could impact the district mission. Staff should be designated to collect, summarize and compile related facts. Subject areas relate directly to the mission and goals statement. Significant participants in the planning process should be identified and contacted for input into the process at this point. Input from individuals can broaden the scope of the information received. To facilitate the process and gather input from the largest audience a survey instrument can be designed to gather opinions.

The individuals contacted by the survey should include <u>at least</u> each unit within the administrative body, each school principal, representatives of parent and teacher organizations, employees of the district, students and representatives of local government and industry.

Questionnaires should ask the respondents to identify threats and opportunities both internally and externally.

A community-based planning committee, the formalized task force, should be established at this time as well.

Selection of the community-based planning committee is an important step in the process. Significant constituencies in the community should be identified and represented in the committee. A list of candidates can be compiled based on an informal survey or the responsibility for participant selection can be shared as shown in Figure 2.

PARTICIPANT SELECTION PROCESS

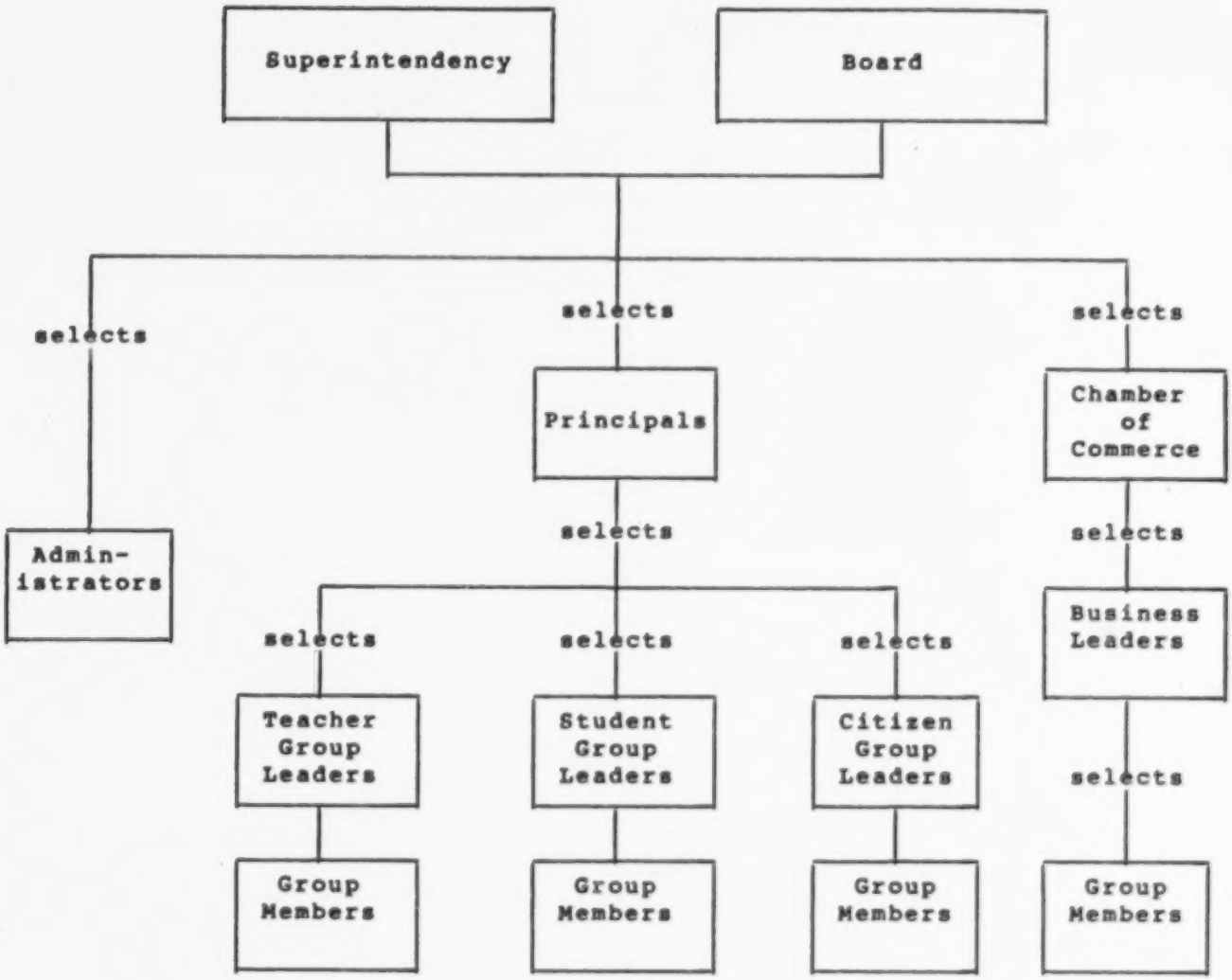



Figure 2

The community-based planning group will meet in several planning sessions throughout the initial planning stages to prioritize and summarize environmental factors and to conduct the final scenario selection (Phase III). Their input will result in a document which outlines the critical issues facing the district. The document will be submitted to the Superintendent and Board for review and used to develop district plans in Phase IV. Prior to the meeting of the community-based planning group, information will be compiled and summarized for their review, specific formats including worksheets will be arranged for data analysis. The first meeting will be a preplanning, brainstorming session in which planning process and procedural details for the group will be covered. Meeting two will allow the group to examine the environmental factors and then give them the opportunity to gather information from their constituencies prior to determining the most likely scenario. Suggestions will be solicited for revision of the mission and goals statement.

The planning horizon will be long-range during Phases II and III and the concerns generalized. In Phase IV the internal planning committee will use the scenarios developed as a guide for program prioritization, and later each department and school will use them for program planning. The budget committee will consider these assumptions when making resource allocation decisions.

Example:

The district's primary mission, as previously defined, is to provide quality educational services to students. Each environmental factor selected must meet the criteria of relevance to this objective and those that follow it. Information should be aggregated at the national, state, regional-local levels with emphasis on the local level. The following is a partial list of the types of issues that may be identified by the group.

1. The district must produce well educated graduates.

| | |
|---|---|
| Data Needed: | Student achievement |
| | Curriculum standards |
| | Labor pool needs |
| | Special needs students |
| Source: | National studies, district records, Department of Economic Security, job projections, survey results |
| Possible Related Issues: | Jobs in the year 2,000 |
| | Accountability |
| | Curriculum standards |
| | Graduation requirements |

2. The district must be effective in terms of a human organization.

Data Needed: Labor pool information

Source: Department of Economic Security, Mesa Planning Dept., U.S. Bureau of Labor, Local Industry, professional organizations, university research, task forces, personnel department and survey results

Possible Related Issues: Teacher shortages

Compensation and benefit trends

Organizational design

Training and development

3. The district must respond to larger societal concerns.

Data Needed: Trends in school law

Community profile

Families in change

Community opinions

Source: Census data, municipal and state human services research agencies, land use studies, district personnel, opinion polls and survey results

Possible Related Issues: Latch-key kids

Adult education

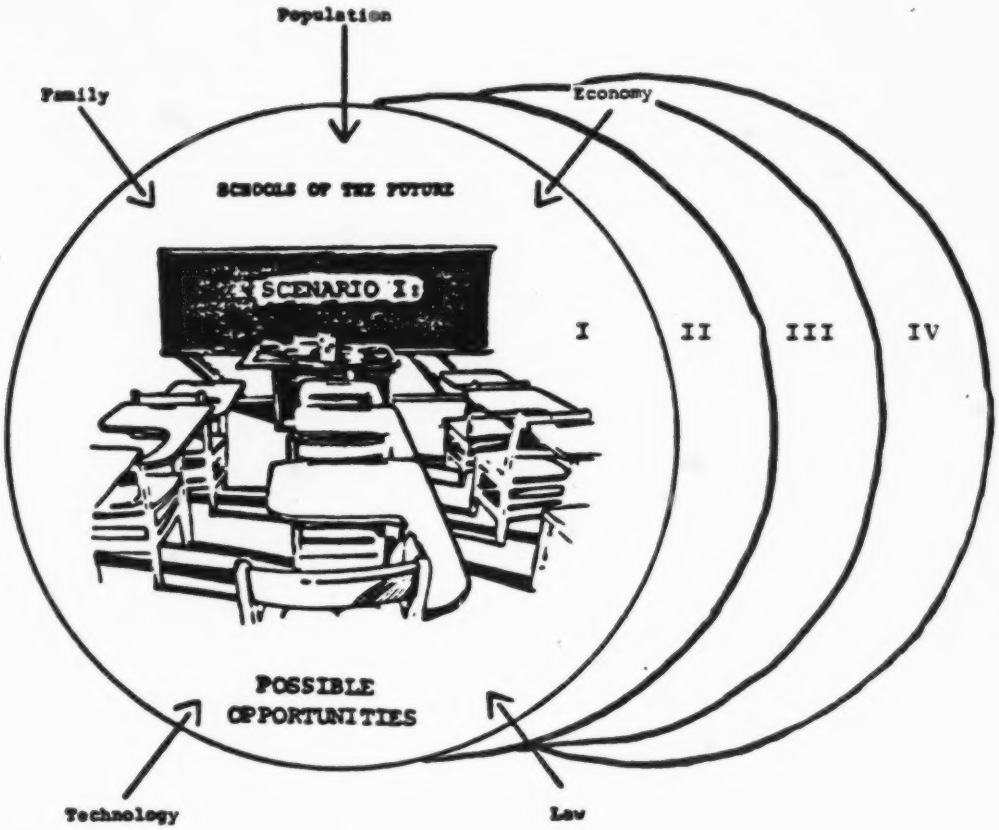
Family structure

Community opinions

4. The district must manage resources efficiently.

| | |
|---|---|
| Data Needed: | Enrollment projections |
| | Pupil-staff ratios |
| | Facilities |
| | Economic growth |
| | Tax base - estimated revenues |
| | Projections of expenses by budget category |
| Source: | Community planning agencies, finance department, national statistics, survey results |
| Possible Related Issues: | Trends in rising costs |
| | Revenue base potential |
| | Student growth |
| | Facilities usage |

## PHASE III:
## SCENARIO SELECTION




Key Questions

* What are the possible scenarios which will evolve in the future?
* Which scenario is most likely to occur?

Planning Activities

A formal analysis of the critical factors identified in Phase II is conducted and several views of the future are developed and evaluated.

A questionnaire will be used to gather opinions in order to construct the most likely scenarios. Each critical factor identified earlier will be assigned a weight according to its importance towards achieving the educational mission of the school. For example, the aging of the population may be considered a critical factor. The importance of this factor when compared to all others should be evaluated. The likelihood will then be judged. A score will be assigned to match the probability that this trend will actually occur in Mesa. Finally, the urgency will be defined. Will the impact be felt this year or in five years?

| CRITICAL FACTORS | RELATED GOAL | WEIGHTING FACTOR | LIKELIHOOD | URGENCY |
|---|---|---|---|---|
| Persons over age 60 will comprise larger proportion of the population | Goal #2 Human Organization | | | |
| | Goal #3 Community Support | | | |

The type of impact, positive or negative will be assigned to the possible outcomes.

| POSSIBLE FUTURES | | |
|---|---|---|
| (CHALLENGE) WORST CASE (-) | NEUTRAL 0 | (OPPORTUNITY) POSITIVE (+) |
| | The increase of older population will have no affect on the ability of the district to meet its mission | Retired volunteers may be introducted into the classroom |
| Older persons may not support the school since they no longer have school-age children | Increase of older population will not affect the level of community support | Support of older population may increase with involvement and volunteers |

In the case of curricular issues the respondent will be asked, "Is this the responsibility of the school or someone else?"

After the community-based planning committee has discussed the issues with their constituencies, this questionnaire will be used to gather opinions.

Future scenarios will then be constructed.

The most likely scenario will be constructed using the following criteria.

These criteria are of immediate concern and should be considered in the one-year plan:

- high likelihood
- high impact (negative or positive)
- responsibility of the school
- occurrence in the next year

A delayed response can be planned. Long-range planning should address these issues:

- occurrence in the next five years
- moderate impact
- responsibility of the school
- high or moderate likelihood

These items should be monitored:

- occurrence in the next ten years
- responsibility of the school
- moderate likelihood
- moderate impact

Several scenarios can be constructed which would indicate the key opportunities and challenges facing the district.

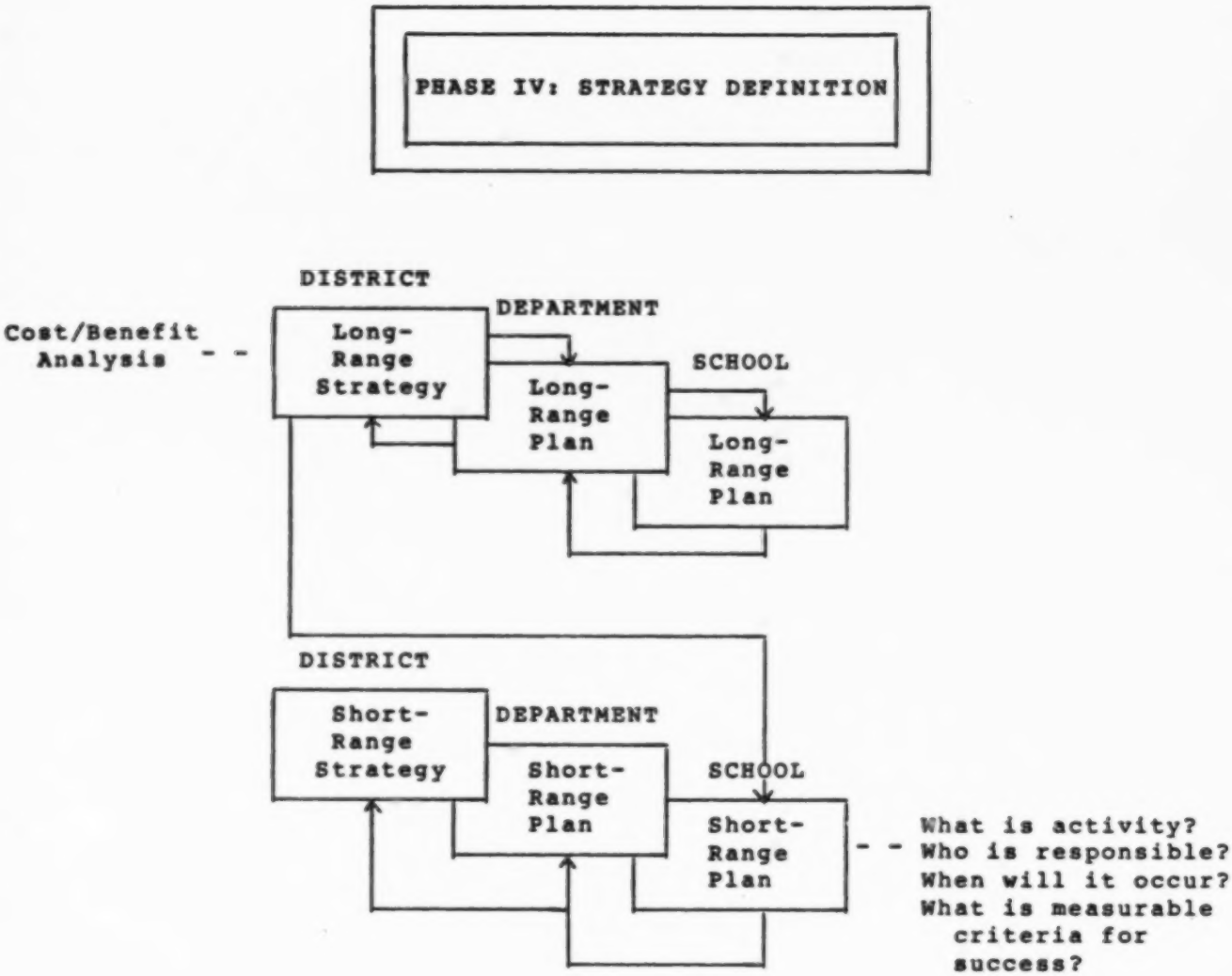
Functional Responsibilities

A planning session is conducted by the community-based planning committee to "fine tune" the environmental assessment which originated in Phase II. As a result of this meeting, a planning document will be created which defines the possible futures which face the district. A decision regarding the urgency and likelihood of occurrence for the major issues must be made by the group in order to prioritize the scenarios.

Staff prepares, summarizes the relevant facts and outcomes of the planning sessions and returns it to the Superintendnecy for review prior to being submitted to the Board.

Final alterations to the mission statement may be made by the Board to reflect new information presented through environmental analysis.

Final documents outlining the goals and mission of the district and the most likely future are distributed to principals and all departmental unit directors for use in planning Phase IV, "Strategy Definition."




Key Questions

* Based upon internal and environmental assessment what long-term strategic planning outlook should be adopted at the district level?

* What strategy will be optimal in terms of resources and results under the current and predicted conditions?

* At the departmental and school level, what long-range strategic plan should be adopted which is compatible with the district plans?

* What activities can be initiated during the current year at the school level to realize the long-term plan?

* Who will be responsible for implementing the plan?

* What resources will be necessary for implementation?

* What is the timeline for achievement of the plan?

* What is the criteria for success in measurable terms?

* How does the school plan fit into the overall mission of the district and the department?

* How can long-range goals at the departmental level be operationalized and implemented during the year?

* What are the short-range performance objectives of the district based upon the departmental and school plans?

Planning Activities

1. Internal planning committee is established.

2. District priorities are defined.

3. Broad strategic plans are developed at the district level.

   a. State the predicted events and relevant facts from the internal assessment.

   b. Brainstorm. Outline several possible solutions to problems or active responses to opportunities.

   c. Perform a cost-benefit analysis on each one.

   d. Select optimal long-range plans.

4. Budget committee is selected.

5. Long-range school proposals are developed.

   a. Conduct an internal assessment.

   b. Generate alternative solutions.

   c. Perform a cost-benefit analysis on each analysis.

   d. Select the optimal strategy.

Long-range District Planning

Broad strategic plans must be established at the district level to direct detailed resource allocation and planning efforts. The scenario proposed in Phase III outlines assumptions regarding the future:

1. of the external environment
    a. significant problems and opportunities in legal, community, family and economic areas.
2. of the internal environment
    a. issues related to student population and school finance.

Long-range district planning must now be conducted in key areas in response to the most likely scenario. These key areas must be defined and participants named. Definition of critical issues is a natural outgrowth of the environmental assessment conducted in the initial planning stages. As a general rule, the areas appropriate for long-range planning will include the following:

Organizational Planning

Program Planning

Human Resource Planning

Operational Planning

Financial Planning

The Superintendency and Board, at this point, assign an internal planning group to coordinate internal planning and make final recommendations concerning district priorities. A neutral planning consultant may be a part of the committee as well as representatives from the administrative units. The members of the community and others in the original planning committee may at this time be assigned to subcommittees in the departments and schools to generate

alternative plans and to select the optimal solution in conjunction with the program areas involved.

The prioritization conducted by the internal committee ranks the various responsibilities of the district which are included in the mission and goals statement.

Program planning based upon the mission definition is of prime concern. It drives operational, financial and human resource planning. It is for this reason that strategic alternatives which directly effect educational outcomes are considered first. Operational planning is an essential element but must support the instructional planning.

Division Plans

Each division prepares a five-year plan using the mission and goals statement, environmental assessment and the program priorities as a guide. Specific planning in these areas should originate from the organizational unit charged with these functions. In the Mesa School District the divisional responsibilities for planning are shared between the Superintendency (organizational planning), the Assistant Superintendent of Curriculum, the Assistant Superintendent of Elementary Schools, the Assistant Superintendent of Secondary Schools and the Assistant Superintendent of Pupil Personnel (Program Planning), the Assistant Superintendent of Business Services (Operational Planning and Financial Planning) and the Assistant Superintendent of Personnel (Human Resource Planning).

The development of division plans will follow a pattern similar to the following:

1. Internal Assessment

Each division will review the planning documents created in previous phases including the external trend assessment, "Toward the Year 2000," the internal trend assessment, "Mesa Previsited," the results of the community-based planning committee's analysis, the program prioritization activity and the district mission and goals statement.

An analysis of the anticipated challenges and opportunities will be conducted in light of internal strengths and weaknesses. An inventory of current status provides the starting point for defining future direction at the divisional level. The conditions of the future described in earlier documents will be reevaluated in light of the division needs. Key factors will be identified for each department. Relevant trends not originally considered should be identified.

2. Goal Definition

Goals will be constructed for each divisional level. The goals define a picture of what the division would want to be in five years.

3. Needs Analysis

The gap between the objectives and the current and projected future of the division establish the critical needs. The needs of the division will be identified to form the basis for long-range planning.

4. Brainstorming

A large number of solutions will be generated through teacher and administrator surveys and discussion in the departmental planning committee.

Information may be gathered from external sources, as well, such as literature searches, research and evaluation studies or university research.

5. Cost-Benefit Analysis

A cost-benefit analysis will be conducted to select the best solution. The alternative that yields the greatest benefit for any given cost will be chosen. A cost-benefit analysis in this case should include intangible process variables and factors which are not necessarily quantifiable.

The result of this five-step planning process will be a five-year plan at the division level. The final plan will define the goals of each division and the strategies to be employed in achieving the goals.

The division will be reviewed by the internal planning committee.

The plans should meet the following criteria:

- compatibility - with district mission and goals
- feasibility - under predicted conditions
  They must be shown to be achievable.
- measurability - Plans must be written so that achievement can be measured.
- completeness - Each long-range plan must identify key activities, responsible individuals, timelines and success criteria.

Those plans which meet these criteria will be accepted by the Superintendency and presented to the Board as part of the long-range district plan. The internal planning committee may return the plan to the division for revision prior to presenting it to the Board for acceptance.

These tentative long-range district plans are used as a tool to develop specific operational plans and will be weighed in the final resource allocation decisions.

School Planning

The next stage in planning adds more specificity. The direction of the planning flow shifts from a top down (district to school) to a bottom up (school to district) approach. (This is not to say that schools have not participated prior to this time but that the major responsibility shifts to them.) Each school meets to conduct internal planning in light of the previous assessment. Long-range goals are developed. A planning committee at the school level should be selected by the principal of the school. Key staff members, parents and community members may be included in the group. The

planning group should not exceed 12 members to facilitate the decision-making process, however, input should be solicited from others. Several planning alternatives should be available to the principal. Guidelines for plan development and a consistent format for school plans should be established.

Each school plan should contain the following:

1. Situation Analysis
2. Mission Statement
3. Long-range Objectives and Goals
4. Strategy Statement
5. Action Programs
6. Budget
7. Controls

Plans should be proposed in the areas of:

Curriculum

Personnel

Operations

Student Services

The long-range plans at the school level must be specific and program based. Assumptions regarding available resources and district program prioritization must be made available to help the school plan within realistic parameters. However, budget constraints should not stifle creative planning.

Deviations from the assumptions of constant funding can be included but should be addressed as a proposed request for additional funding.

Planning at the school and departmental level follows the patterns of district planning. A new cycle of setting goals, examining the environment and selecting strategies is begun. Because the most-likely scenario has already been defined, the school need not repeat this step. However, school plans should relate directly to previous steps.

Long-range plans at the school level are reviewed by the Assistant Superintendents of Curriculum, Elementary Schools, Secondary Schools, Pupil Personnel and Associate Superintendent, Educational Services. Departmental plans are accumulated and sent to the internal planning committee for the final review and presentation to the Superintendency and Board.

If the plans are not within the framework of long-range district strategy, they are returned to the school or department for revision prior to inclusion in the district plan.

Short-range - One-year Planning

A natural outgrowth of the five-year plan is a one-year plan at both the division and the school level. Specific budget proposals and program plans must be established. The planning process at each of these levels follows the pattern previously discussed:

1. internal assessment and environmental analysis
2. definition of alternative solutions
3. cost/benefit analysis
4. strategy selection

Plans for the following school year must be drafted and sent to the appropriate assistant/associate superintendent and the budget committee for review. Each plan should include the following:

One-year Plans

Time Lines

Responsibilities

Terminal Performance Objectives

Target Group

Costs of Implementation

Constraints to Success

Performance Standards

## PHASE V: IMPLEMENTATION AND REVIEW

Key Questions

* What follow-up measures in the future will help assess over the long-term whether efforts should be continued, ended or changed?
* Is the scenario upon which long-term planning has been based still realistic?
* Do contingency plans need to be developed based upon changing factors?
* Is the planning process efficient and effective?

The "final" stage, in the planning model, Phase V, is key in that it provides the impetus for continuation of the planning process. Planning should not be a static, one-time event.

Implementation is the realization of the planning effort but not the culmination of the planning cycle.

Review is crucial in a rapidly changing environment. Monitoring key factors is especially important in a growing area such as Mesa.

Although monitoring is depicted in the planning diagram as a separate activity preceded by strategic definition, review is a component of each step of the planning process. Review prior to

initiation of the planning model is needed to evaluate the appropriateness of the model itself and incorporate changes before implementation. Similarly, during Phases I, II, III and IV smaller review and revise cycles are established.

During Phase IV five-year plans are developed for each organizational unit and aggregated at the district level and short-term operational plans are written. Well-written plans include all the necessary information to guide activities and benchmarks by which to measure performance.

In Phase V activities are initiated and the tendency to neglect the planning process may become apparent. A conscientious effort to periodically assess activities and reorder plans must be made.

Twice yearly the internal planning committee should meet to summarize progress in the planning cycle. Specific changes may need to be made in the planning model. One member of the committee should be designated as the key contact person. Progress reports and problems should be funneled to this person from the departmental units. The committee will meet in special session to resolve any procedural crisis which cannot be deferred until the regular meeting. Significant changes in the planning parameters must also be monitored by the committee to ensure that alternative strategies are developed in time to change plans. This responsibility is shared by all members of the committee. Key concerns should be identified and monitoring responsibilities distributed among the membership. In addition to a formal review twice yearly, each member should be able to call a special meeting as needed.

At year end, after the first plans have been implemented, a final evaluation of the ability to achieve the goals established in each departmental unit must be conducted. Prior to development of new goals for the following year a reassessment of the planning parameters must be conducted and the district mission and goals should be reviewed.

# Appendix I

# PHILOSOPHY AND GOALS of the Mesa Public Schools

mesa, arizona

SUPERINTENDENT

George N. Smith, Ed. D.

BOARD OF EDUCATION

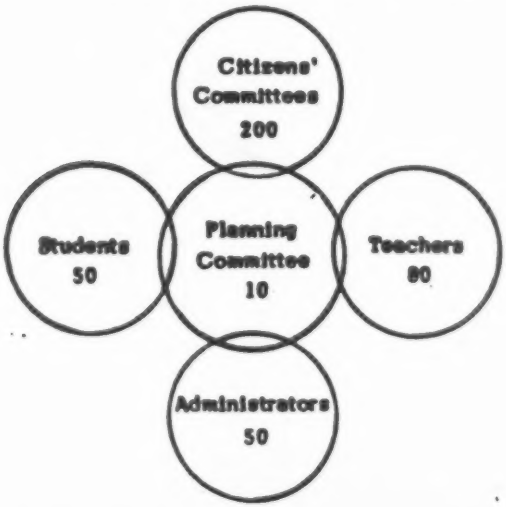
Lin Werner
Dr. John Kerr
Lynn Sharp
Donald Ellsworth
Rani Louthan

Produced by
Educational Services
Division

Dell Chamberlain, Ed. D.
Assistant Superintendent

# PHILOSOPHY AND GOALS OF THE MESA PUBLIC SCHOOLS

## School and Community Involvement



### A Message from the Superintendent

A select committee of parents, teachers, students and school administrators developed the philosophical contents of this booklet and their efforts exemplify this district's commitment to the right of those involved to help determine the educational programs for our schools.

This committee's philosophical belief is that education is a continuous process of growth. By using the statements contained herein as a foundation, the Mesa Schools will be able to provide all students with a stimulating program, thereby enabling each child to achieve his greatest potential.

As an outgrowth of this study, the teachers and administrators of the district have developed an instructional program consistent with this philosophy. Goals are listed for every subject and behavioral objectives for four levels: primary, intermediate, junior high and high school.

We believe that this booklet will provide a thorough understanding of our school programs and will be a key to strong community trust and support of the Mesa Public Schools.

Dr. George H. Smith
Superintendent

BEST COPY AVAILABLE

## STATEMENT OF BELIEF CONCERNING CONDITIONS OF SOCIETY

WE BELIEVE

The most important element of any culture is the quality of its people. This culture, if it is to be deemed successful, must produce enlightened people who expand the potential of man. All other entities are only supportive or indicative.





At given periods of time, those responsible for the schools must make decisions concerning the improvement of education. Education should be a self-directing and self-correcting process. A philosophy of education and the objectives of instruction indicate which direction education should take.

A philosophy of education in today's highly technical and specialized society must recognize some of the major problems and issues confronting the American people. Some of these are:

- Struggle for human equality
- Elimination of poverty
- Explosion of population
- Production and distribution of food
- Struggle between democratic and communistic systems
- Threat of nuclear warfare
- Advances in automation and technology
- Changing balance in work and leisure time
- Rise of protest and rebellion
- Problems of urbanization
- Advancements in medical and biological sciences
- Breakdown in religious, ethical and moral concepts
- Increasing illegal use of drugs and narcotics
- Pollution of the environment
- Degree of commitment to space exploration

The schools should develop centers to serve the educational needs of the entire community. The greatest challenge education faces today is to assist in the preparation of people who can solve the moral, social and political problems that presently face society. As society becomes more complex, impersonal, anonymous and indifferent to the individual, that individual may be unable to cope with the realities of a rapidly changing environment. Today's most urgent need is for a constantly improving and more realistic program of education for every individual. Society should provide the opportunity for people to achieve their potential.

The sheer mass of knowledge to which modern man is exposed and the rapid rate of changing conditions of life may result in a feeling of impermanence and insecurity. Therefore, today's students should become *flexible, problem solving, self-directed, learning individuals.*

*Students should be able to deal with problems as they arise. They should be concerned with moral and ethical issues, as well as with ideas.*

## STATEMENT OF BELIEF CONCERNING MAN

A. Man is a rational, reasoning, feeling being. He is responsible for his actions and is capable of influencing his own destiny.

B. Man exists in a complex world which challenges personal worth.

C. Man seeks meaning in life as well as survival.

D. Man seeks self-esteem and recognition of his own individual worth and dignity.

E. Man needs freedom to learn, grow, create, believe, change and develop responsibly in a pluralistic, democratic society.

F. Man is a total being and a challenging curriculum must have a corresponding quality of wholeness.

SECTION II

## STATEMENT OF BELIEF
## CONCERNING THE FUNCTION OF THE SCHOOL

WE BELIEVE

A. The school is the primary institution charged with the responsibility for the formal education of young people. The family, the church and other agencies are also involved in education. The school has the responsibility to assist with the continuous education of all people.

B. It is the responsibility of the school to provide the opportunity for each student to achieve certain educational goals to the full extent of his capabilities.



GRADUATES OF THE MESA SCHOOLS SHOULD ACQUIRE THE FOLLOWING:

* Useful work habits and basic skills of learning
* Effective methods for obtaining new knowledge and desire for continued learning
* Effective communication skills, (reading, writing, and speaking)
* Information and knowledge relevant to the learner
* Critical and effective methods of thinking
* Desire and aptitude to participate in government through the democratic processes
* Efficient participation in the economic system
* Responsible citizenship including social awareness and commitment to participation in civic betterment
* Concern for the preservation of natural resources
* Awareness of the importance of sound mental and physical health
* Balance in the development of physical, mental and emotional maturity
* Individual maturity toward stable family relationships
* Ethical and moral development in a consistent value-system of life
* Skill in personal-social adjustment and human relationships
* Concern for the worth and dignity of every individual
* Curiosity, creativity, and a range of significant interests
* Appreciation of the fine arts
* Understand and appreciate people who belong to different cultural, social, and ethnic groups

B. continued -

**IMPLICATIONS FOR INSTRUCTION**

All instructional personnel should direct their efforts toward student achievement of the preceding goals.

Every learning experience provided for students should be based upon the specific behavioral objectives which make a contribution to one or more of these goals.

The administration and teachers should make a constant evaluation of all educational activities with these goals as the baseline for success.

C. As a function of the school, education involves three major dimensions: the subject field, which guides the direction of study; the behavioral, which consists of the learning process; and the environmental, which includes the aspects of technology, physical facilities, and organization.

**IMPLICATIONS FOR INSTRUCTION**

All educational experiences should be based upon the best that research has to offer concerning the structure and nature of the disciplines (subject areas) and concerning how the most effective learning takes place.

An increasing analysis and use of technological tools of learning should be present.

The physical facilities and organization should promote the greatest opportunity to reach the educational objectives.

School plants, grounds, and facilities should be aesthetically pleasing.

D. The school should develop curriculum which will promote the philosophy and values of the Mesa Public Schools by using the representative ideas and content of the subject areas.

**IMPLICATIONS FOR INSTRUCTION**

Each discipline should develop a series of experiences drawn from the content of the subject and from a summary of the accumulation of the important knowledge in the field.

These experiences should be organized in a scope and sequence pattern compatible with student maturity and should be selected on the basis of what is known about how the most effective learning takes place.

These experiences should have social and personal relevance.

E. The school should strive to show that change is more constructive and desirable if attained by democratic procedures than if by violence and revolution.

**IMPLICATIONS FOR INSTRUCTION**

The school should provide functional practice in democratic processes and values at each level.

The school should provide experiences in learning to direct efforts for orderly and lawful change and to cope with requests for change.

The school should provide learning which analyzes pressures for change and attempts to develop the ability to judge change in the light of the value system of the individual and society.

F. The school should provide experiences in which every individual can achieve success consistent with his ability.

**IMPLICATIONS FOR INSTRUCTION**

The educational activities should be interesting, appealing, and rewarding.

The school should provide opportunity for the student to become increasingly self-directing in the educative process.

The school should be held accountable for providing opportunity for every student to acquire the skills of learning in so far as he is capable.

## STATEMENT OF BELIEF CONCERNING THE LEARNER AND THE LEARNING PROCESS

WE BELIEVE

A. There are similarities and differences among individuals in relation to the learning process.

IMPLICATIONS FOR INSTRUCTION

In order to prescribe appropriate learning tasks, diagnosis must be made for each student of his physical, social, intellectual and emotional needs.

Learning situations must be provided at many levels in different groupings and enhanced by a variety of approaches.

The student must have an opportunity to think and to work as an individual and as a member of groups of various sizes and age levels.

The individual's achievement, commensurate with his ability and needs as determined by the student, school personnel and parents, should serve as a basis for the evaluation of a student's progress.

B. Learning is the responsibility of the individual learner; the teacher is responsible for the learning climate.

IMPLICATIONS FOR INSTRUCTION

By providing opportunities for freedom of choice, the teacher helps the student accept the responsibility for his own education.

The amount and degree of freedom of choice should depend upon the maturity of the learner.

The learning atmosphere must provide the opportunity for learning to take place through the process of inquiry and discovery.

Students can share in planning their learning activities.

To be a participating member of a democratic society, a student must be responsible for his own behavior.

C. The child is in a continual process of individual growth which occurs as an interchange process between his personal goals and the goals set by society.

**IMPLICATIONS FOR INSTRUCTION**

The relationship between the teacher and pupil is one of mutual respect in which the teacher acts as a facilitator and/or resource person.

The school should provide experiences which develop individual recognition of the pluralistic nature of our society.

Children need to function in a learning environment in which:

- they can exhibit their own individuality which the school accepts in a positive rather than negative manner
- their natural growth patterns become a partial basis for teaching
- they can act in an atmosphere of relative freedom and can be accepted as the individuals they are
- they can learn to share and work with others in a meaningful and constructive way





D. The child has rights and responsibilities as an individual and as a member of society.

**IMPLICATIONS FOR INSTRUCTION**

The curriculum should plan all learning experiences in such a way as to preserve the uniqueness and integrity of the individual.

The learner shall have the opportunity to modify the learning environment. Procedures should give the student an opportunity to select his own program as he assumes responsibility to apply his efforts and to achieve worthwhile objectives.

The specific behavioral objectives which make a contribution to one or more of these goals should provide a meaningful learning experience for students.

The child has the right to be recognized for each accomplishment regardless of the level of such achievement.

E. Learning is evidenced by a change in perception and behavior.

**IMPLICATIONS FOR INSTRUCTION**

The student who is involved in learning changes behavior through a process of perceiving, behaving and becoming.

In the educative process the teacher has the primary task of contributing to a change in the perception and behavior of the student.

Plans for evaluation must include ways of determining changes in perception and behavior.

What the student learns may not be what the teacher intended; it may be something negative, and behavior will so indicate.

F. Most meaningful learning takes place through the process of inquiry and discovery for oneself.

- Learning should provide experiences which lead students into decision making.
- Students should have opportunities to study problems of life in an effort to seek solutions.
- The multiple experiences that have value to the child provide learning.
- The learning processes should provide opportunities for children to recognize that there are many ways to do a task or to express oneself.





G. The constructive inter-relationship of people with the learning process is necessary.

Mutual respect of all persons involved in the learning process should be paramount.

The instructional process should provide two-way communication among all individuals involved in the learning experience.

The learning process should involve the parents as much as possible.

Children may help other children learn more effectively than an adult can.

All persons at a school, certificated and classified, are part of the learning process and SHOULD SO CONSIDER THEMSELVES.

The atmosphere should give each child personal recognition and a feeling of closeness to others.

The emotional tone of the classroom, the amount of acceptance and approval, and the development of an attitude that fosters creativity are vital to a good classroom learning atmosphere.